



# eFiling: *Best Practices*

- Guiding Principles

- Leveraging Technology



# Designate Key People

- Individual or group to maintain pleading document templates
- Individual or group to regularly check and disseminate updates/changes in ECF procedure
- Organize staff members involved in eFiling initiatives on a routine basis to discuss experiences involving eFiling both locally and nationally



# Key Law Firm strategies

- Create a basic survival kit handbook (preferably in electronic form) including eFiling procedures, tips and contact information for support
- Create a secure system in which the firm has the ability to electronically file documents on an absentee attorneys behalf
- Create a workable solution wherein both staff and attorney feel comfortable managing eFilings that occur after 5:00 pm



# Key Law Firm strategies

- Schedule periodic training sessions
- Create shortcuts to ECF website areas
  - Web-Links from the Windows “Start” menu
  - Add to Web Browser Favorites/Bookmarks
  - Hyper-links in word processing document(s)



# IT Department Rules

- Create guidelines for the IT/IS department
  - Document management systems
  - PDF software
  - Word Processing software
  - eMail management guidelines
  - Web browser





# Create a IT/IS checklist

## Skills Training Checklist for IT Staff

### Windows - 2000/XP

- Managing Folders, including view options
- Windows Explorer
- File Management
- Sorting files by name, date, type
- Saving files to the correct location!
- Cut, Copy and Paste
- Deleting files
- Copying files
- Moving files
- Searching for files
- File Directory structures (desktop, C: drive, network drives)
- File extensions (wpd, pdf)
- right-mouse clicking

### Adobe Acrobat 5/6

- Printing to a file (from wordprocessor)
- Naming a file
- Viewing a file
- Copy and paste text
- navigating through a document
- display preferences - full page vs. page width
- Editing a file - limited text editing

### Wordprocessing Software

- Printing to pdf
- Turn off auto-capitalization
- File, Save vs. File, Save As
- Setting a default location for File, Open

### E-mail Software

- Attachments
- Virus recognition

### Browser Training

- What is a browser? Internet Explorer and Netscape
- Use of the Back button
- Reload/refresh



## Other Guiding Principles – Filing In Other States

- Create an electronic reference guide for each state and district where your firm files
- Highlight the differences between that state and MN



# Other Guiding Principles – Filing In Other States

- Do you have everything?
  - Word compliance
  - Certificate of service
  - Create a checklist



# What is electronic, stays electronic!

Can I make paper electronic?





# Managing your email

- Create folders in your email inbox folder
- Create folders that interact with your Document Management System (DMS)
- Setting “Rules” to manage ECF notices



# Managing Pleading files

- Designate key players to retrieve and manage your Pleading files who are responsible for...
- Ask - Where to store pleading type documents?
- Use your Documents Management System
- Use your Litigation Support Software



# Managing Pleading files

- Copy your pleadings along with you on a laptop when you need to be mobile
- You can access the PDF's and email them to your client or 3rd parties
- Create associations for further fact finding, research, responding, or similar case strategy initiatives



## And Lastly – Other Things to Think About

- Rules on signatures and paper copies for your firm
- Deadlines for attorneys to have filings prepared for same day filing. ex. 3:00 p.m.
- Managing your login and password
- Filing errors
- Communicating when document is ready for ECF posting